Site-based Online Claims Manual

How to enter, modify, view-print claims for
the National School Lunch Program, School Breakfast
Programs, and the Afterschool Snack Programs.

For 2017-18 School Year

Revised November 2017

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About Submitting Monthly Child Nutrition Claims

- All claims must be submitted electronically by accessing DPI Wisconsin [Child Nutrition Program Online Services](#).
- Print a hard copy of all submitted claims for your records. Retain for three years plus the current year.
- A separate claim must be submitted for every month, even if the month consists of only one day of meal service to students.
- Processing of submitted claims occurs each Tuesday morning, unless that day is a holiday, in which case the processing would happen the following day. Payment processing does not occur the last two weeks of June and the last two weeks of December so that DPI's Business Office can do fiscal-and year-end closeouts.
- You may only submit one claim for each Child Nutrition Program per processing period.
- All schools will receive their reimbursement payment via electronic deposit through [AIDS Banking](#).

Deadlines

You have 60 days from the last day of the claiming month to submit claims. Below is the calendar of claim submitting deadlines.

Claiming Month	Last Day for Submitting in Online Services or Receipt/Postmark at DPI
January	April 1 (March 31 on leap years)
February	April 29
March	May 30
April	June 29
May	July 30
June	August 29
July	September 29
August	October 30
September	November 29
October	December 30
November	January 29
December	March 1 (February 29 on leap years)

Late Claims

USDA requires the DPI to deny claims submitted more than 60 days after the end of the claiming month, but DPI is allowed to approve one exception per 36-month (three-year) period to the 60-day claim submission deadline per program (NSL, SB, etc.). A paper claim will need to be submitted.

Entering the Wisconsin Child Nutrition Programs Online Services

1. Go to the Wisconsin Department of Public Instruction (DPI) Child Nutrition Programs webpage dpi.wi.gov/nutrition. Click on *Online Services* on the left navigation bar, which will bring you to the Online Services webpage.

2. On the Online Services page dpi.wi.gov/nutrition/online-services, there are different entry portals to access the online system. Click on *Online Services Log-in* button on the left column for submitting claims.

3. Here you will log in using your agency code and password. **Do not bookmark this webpage.** If you wish to bookmark, please go back to Step 2 and bookmark that page.

4. Enter your **agency code.** This is your six-digit agency code/number.
   a) Do not use hyphens. Use only the numerals in the agency code.
   b) Do not enter leading zeroes: For example, if your agency code is "012345", only enter "12345".

5. Type in your agency-specific **password**. To retrieve a forgotten password, please contact the Federal and State Grants Program at DPI at 608-267-9134.

6. Click the *Submit* button. (The *Reset* button will clear all data entered in fields so it may be re-entered.) You are now logged in to Child Nutrition Online Services.

7. On this screen, the yellow menu bar has the following menu options:

   Home-Day Care: For home day care providers only.

   School Nutrition Program: For school agencies participating in School Nutrition Programs.

   Community Nutrition Program: For agencies participating in the Child and Adult Care Food Program (CACFP).

   Summer Food Program: For agencies participating in the Summer Food Service Program (SFSP).

   Special Milk Program: For agencies (school or non-school) participating in the Special Milk Program.

   Other Services: This button links to the DUNS number entry page for agencies new to the DPI Child Nutrition Programs.

   Log Out: This is where you can click, at any page on the website, to log out of your account. Be sure to click Logout every time you exit the online claiming portal.

National School Lunch Program (NSLP)

1. Once you have logged into Online Services, select *School Nutrition Program* from the menu bar.

2. Select *Monthly Reimbursement Claim*

3. Select *National School Lunch Program*

4. Select *Enter Claim* to enter a new claim for reimbursement.

You are now on the claim screen. First, select the month for which you are **claiming** and the **correct year** from the drop-down box.

5. Then, click on "**Template File.**"

6. An excel spreadsheet will appear with all sites in your agency listed by school code. (School codes may be found on Schedule A of your SFA's on-line contract.)

7. **Student Approved Free -** Enter the <u>highest</u> number of students who are **approved for free** meals during the claiming month at each site, based on approved free and reduced price applications on file and/or through direct certification.

   For CEP sites, **Student Approved Free** is calculated by multiplying the site's free claiming percentage by the site's enrollment. **In this example, school code 20 and 210 are CEP sites.**

8. **Student Approved Reduced** - Enter the <u>highest</u> daily number of students who are **approved for reduced** price meals for each site during the claiming month, based on approved applications on file. *Since sites 20 and 210 are CEP sites, site 40 is the only site which has reduced eligible students.*

9. **Days Operating** - Enter the number of days the site served lunches during claiming month. *(This number may be different for each site.)*

10. **Enrollment** - Enter number of enrolled students who had <u>access</u> to NSLP at each site during the claiming month. "Enrolled" children are those who have been formally approved to attend your school. Do not include half-day kindergarten and pre-kindergarten students if they do not have access to the lunch program. "Third Friday" enrollment can be reported, if monthly enrollment is not computed. The number of enrolled students <u>can never be less</u> than Average Daily Attendance.

11. **ADA** (**average daily attendance**) - Enter the ADA for each site. The ADA calculated for the month <u>cannot exceed</u> the reported enrollment. This figure is entered as a whole number, not a percent, and is the number of students <u>attending</u> school who have access to the lunch program, <u>not</u> the number of students eating a lunch (participation).

12. **Free Student Meals** - Enter the number of lunches served to students approved for free meals at each **NON-CEP** site during the claiming month. *Since site 40 is the only non-CEP site, only the free meals served at that site are entered in this column.*

13. **Reduced Price Student Meals** - Enter the number of lunches served to students approved for reduced price meals at the site during the claiming month. *Since site 40 is the only non-CEP site, only the reduced meals served at that site are entered in this column.*

14. **Paid Student Meals** - Enter the number of lunches served to paid students at each **NON-CEP** site during the claiming month. *Since site 40 is the only non-CEP site, only the paid meals served at that site are entered in this column.*

15. **Total CEP Meals –** Enter the **total** number of lunches served to students at the CEP site. ==*The Free and Paid claiming percentages approved within the agency's online contract will auto-calculate the number of free and paid lunches to claim.*==

16. **Delete the top row of headings**. To do this, a) highlight the entire first row, b) click on "Home" on the top menu, c) click on "Delete".

Please note that after deleting the headings, the data for the first school moves up to the first row.

18. "Save" the electronic excel file with deleted headings to your computer and label it with the claim type and month of claim. We strongly recommend you create and name a folder just for all your saved monthly claims.

19. Return to the claim screen (you should still be logged in.).
Click on **BROWSE** and choose the file that you just saved to your computer.

20. Click **UPLOAD** to upload the excel file into the online claiming portal.

21. This page will auto populate based on your excel sheet. Review your numbers. Make sure all of your sites are listed on the claim and no error messages, then click **NEXT.** If there are error message refer to the section on Troubleshooting.

22. This screen shows the total lunches that you are claiming by category for each site. In this example, **CEP sites 20 and 210 have auto-calculated the number of free and paid lunches to claim based on the site's free and paid claiming percentages, pulled from the agency's online contract, multiplied by the total CEP lunches served at that site. There should not be reduced lunches claimed for the CEP sites.** Make sure totals are correct and click **NEXT.**

This page will auto-populate. Check all information on the claim, enter CERTIFICATION information (your contact information), and click **SUBMIT** to submit the claim.

View-Print a NSLP Claim

1. Select *View-Print Claim* to view and/or print a claim. A claim may be viewed and/or printed after it has been submitted to DPI. The claim does not have to be processed to be viewed.

2. Select date claim month and year from the drop-down list box and click "**SEARCH**" button. If a claim is found for the given criteria, it will appear in the box below the *Claim Type*. Click the hyperlink to view the full claim information.

3. A list of all of the individual school site's claiming information will appear at the bottom of the claim, so you can do a final check of the submitted information. Because this claim is "New (Unpaid)" which means it has not been processed for payment, it may be modified by the SFA.

Modifying a NSL <u>Unprocessed</u> Claim

1. Open the saved excel file on your computer that you want to modify and make the changes needed. "Save" the excel file again to your Monthly Claim folder.

2. In Online Services, select *Modify Claim* from the menu to modify an **unpaid and unprocessed** NSLP claim for reimbursement.

> If your claim is in "Paid" status, the claim CANNOT be modified online. You must submit an Adjustment via fax or email a scan of the changes to the attention of Jacqueline Jordee, fax 608-267-9207; email Jacqueline.jordee@dpi.wi.gov. See "Submitting a Claim Adjustment".

3. The unpaid submitted claim will appear. If you wish to modify the claim, check the box in the lower left-hand corner. If you check this box and click **NEXT**, the previously submitted claim will be removed from the system, and it will take you back to the claim site upload.

4. Upload the excel spreadsheet from your computer with the corrected numbers.

School Breakfast (SB) and SB Severe Need Claims

1. Log into Online Services, select *School Nutrition Program* from the menu bar.

2. Select *Monthly Reimbursement Claim*.

3. Select *School Breakfast Program*.

4. Select *Enter-Modify Claim* to enter a new claim for reimbursement or modify the previous month's claim.

5. Select *Enter-Modify Claim* to enter a new claim for reimbursement or modify the previous month's claim.

6. Select from the drop down box, which type of School Breakfast claim you would like to Enter- Modify, *Regular School Breakfast*, or *Severe Need School Breakfast*. **If your SFA has schools that are in Regular School Breakfast and Severe Need School Breakfast, you will need to enter two claims, one for Regular School Breakfast and one for Severe Need Breakfast.**

7. You are now on the claim screen. First, select the month for which you are **claiming** and the **correct year** from the drop-down box.

8. Then, click on "**Template File**."

9. An excel spreadsheet will appear with all sites in your agency that serve severe need breakfast listed by school code. (School codes may be found on Schedule A of SFA's online contract.)
   Note: Average Daily Attendance (ADA) will be left at 0 since we do not collect ADA data for breakfast claims.

10. **Student Approved Free -** Enter the highest number of students who are **approved for free** meals during the claiming month at each site, based on approved free and reduced price applications on file and/or through direct certification.

    For CEP sites, **Student Approved Free** is calculated by multiplying the site's free claiming percentage by the site's enrollment. **In this example, school code 20 and 210 are CEP sites.**

11. **Student Approved Reduced -** Enter the highest daily number of students who are **approved for reduced** price meals for each site during the claiming month, based on approved applications on file. *Since sites 20 and 210 are CEP sites, site 40 is the only site which has reduced eligible students.*

12. **Days Operating -** Enter the number of days that each site served breakfasts during the claiming month.

13. **Enrollment** - Enter the number of enrolled students who had <u>access</u> to the Severe Need Breakfast Program at the site during the claiming month. "Enrolled" children are those who have been formally approved to attend your school. Do not include half-day kindergarten and pre-kindergarten students if they do not have access to the breakfast program.

14. **Free Student Meals** - Enter the number of severe need breakfasts served to students approved for free meals at each **NON-CEP** site during the claiming month. *Since site 40 is the only non-CEP site, only the free severe need breakfasts served at that site are entered in this column.*

15. **Reduced Price Student Meals** - Enter the number of severe need breakfasts served to students approved for reduced price meals at the site during the claiming month. *Since site 40 is the only non-CEP site, only the reduced severe need breakfasts served at that site are entered in this column.*

16. **Paid Student Meals** - Enter the total number of severe need breakfasts served to paid students at each **NON-CEP** site during the claiming month. *Since site 40 is the only non-CEP site, only the paid severe need breakfasts served at that site are entered in this column.*

17. **Total CEP Meals** – Enter the total number of severe need breakfasts served to students at each CEP site. ==**The Free and Paid claiming percentages approved within the agency's online contract will auto-calculate the number of free and paid breakfasts to claim.**==

18. **Delete the top row of headings**. To do this, a) highlight the entire first row, b) click on "Home" on the top menu, c) click on "Delete".

    Please note that after deleting the headings, the data for the first school moves up to the first row.

19. "Save" the electronic excel file to your computer and label it with the claim type and month of claim. We strongly recommend you create and name a folder just for all your saved monthly claims.

20. Return to the claim screen (you should still be logged in.).
    Click on **BROWSE** and choose the file that you just saved to your computer.

21. Click **UPLOAD** to upload the excel file into the online claiming portal.

22. This page will auto populate based on your excel sheet. Review your numbers. Make sure all sites are listed on the claim and there are no error messages, then click **NEXT.** If there are error message refer to the section on Troubleshooting.

23. This screen shows total severe need breakfasts that you are claiming by category for each site. In this example, **CEP sites 20 and 210 have auto-calculated the number of free and paid severe need breakfasts to claim based on the site's free and paid claiming percentages multiplied by the total CEP breakfasts served at that site. There should not be reduced severe need breakfasts claimed for the CEP sites.** Make sure totals are correct and click **NEXT.**

24. This page will auto-populate. Check the information on the claim, enter your CERTIFICATION information (your contact information), and click **SUBMIT** to submit claim.

View-Print a SB Program Claim

1. Select *View-Print Claim* to view and/or print a claim. A claim may be viewed and/or printed after it has been submitted to DPI. The claim does not have to be processed to be viewed.

11. Select the Breakfast type (Regular School Breakfast or Severe Need School Breakfast) from the drop down box. Select the date claim month and year from the drop-down list box and click the **"SEARCH"** button. If a claim is found for the given criteria, it will appear in the box below the *Claim Type*. Click the hyperlink to view the full claim information.

12. A list of all individual school site's claiming information will appear at the bottom of the claim, so you can do a final check of the submitted information. Because this claim is "New (Unpaid)" it has not been processed for payment, it may be modified by the SFA.

Modifying a SB/Severe Need SB Underprocessed Claim

1. Open the saved excel file on your computer that you want to modify and make the changes needed. "Save" the excel file again to your Monthly Claim folder.

2. In Online Services, select *Enter-Modify Claim* from the menu to modify an **unpaid and unprocessed** claim for breakfast reimbursement, and select the breakfast type for which you are claiming from the drop-down box, then click continue.

> If your claim is in "Paid" status, the claim CANNOT be modified online. You must submit an Adjustment via fax or email a scan of the changes to the attention of Jacqueline Jordee, fax 608-267-9207; email Jacqueline.jordee@dpi.wi.gov. See "Submitting a Claim Adjustment"

3. The unpaid submitted claim will appear. If wish to modify the claim, check the box in the lower left-hand corner. If you check this box and click **NEXT**, the previously submitted claim will be removed from the system, and it will take you back to the claim site upload.

4. Upload the excel spreadsheet from your computer with the corrected numbers.

Afterschool Snack Program

The **"Snacks (SK_NSL)"** is for sites that are not "area eligible" and snacks are claimed for reimbursement based on individual student eligibility.

The **"Snacks-Area Eligible (SK- NSLAE)"** is for sites that are "area eligible", and all snacks are claimed for free reimbursement regardless of each individual participant's eligibility for free or reduced price meals.

An Afterschool Snack Program site qualifies as <u>area eligible,</u> if 50 percent or more of its enrollment are eligible for free or reduced price meals or if it is located in the attendance area of a school which has at least 50 percent of its enrollment eligible for free or reduced price meals.

CEP sites are area eligible if the *individual* site Identified Student Percentage (ISP) X **1.6** is equal to or greater than 50 percent. Thus, a CEP school is area eligible if a school's individual ISP is at least 31.50 percent (e.g., individual school ISP of 31.50% x 1.6 = 50.4%), or the school is located in the attendance area of another school that is area eligible.

If a CEP school **does not** qualify as area eligible (e.g., individual school ISP of 30.000% x 1.6 = 48.0%), they use the same **group** claiming percentage (free and paid) that they use to claim meals under the NSLP and SBP. They would not have individual meal eligibilities to claim with. If you have some school snack sites that are area eligible and some that are not, the school must file two separate claims, entering participation information on the appropriate screen.

Entering an Afterschool Snack Program Claim (not area eligible)

1. Once you have logged into Online Services, select *School Nutrition Program* from the menu bar. Then select *Monthly Reimbursement Claim.*

2. Select **Afterschool Snacks** - *If your SFA has schools that are in Afterschool Snacks and Afterschool Snacks Area Eligible, you will need to enter two claims, one for Afterschool Snacks and one for Area Eligible Afterschool Snacks.* First, we will submit a regular Afterschool Snack claim.

3. Select *Enter-Modify Claim* to enter a new claim for reimbursement.

5. You are now on the claim screen. First select the month for which you are **claiming** and the **correct year** from the drop-down box.

6. Then click on "**Template File**."

An excel spreadsheet will appear with all Afterschool Snack sites (not area eligible) in your agency listed by school code. (School codes are found on Schedule A of SFA's on-line contract.)
Note: *Enrollment and Total CEP Meals are "0" as we do not collect this information for Afterschool Snack claims.*

7. **Student Approved Free -** Enter the <u>highest</u> number of students who are **approved for free** meals during the claiming month at each site, based on approved free and reduced price applications on file and/or through direct certification.

   For CEP sites (not area eligible), **Student Approved Free** is calculated by multiplying the site's free claiming percentage by the site's enrollment.

8. **Student Approved Reduced** - Enter the <u>highest</u> daily number of students who are **approved for reduced** price meals for each site during the claiming month, based on approved applications on file. (CEP sites do not have reduced eligible students.)

9. **Days Operating -** Enter the number of days the site served snacks during claiming month.

10. **ADA (average daily attendance)** - Enter the average daily attendance (ADA) for afterschool snack for the claiming month at the school. These boxes are for the number of students **attending** the *afterschool snack schools, **not** the number of students eating snacks.*

11. **Free Student Meals** - Enter the number of afterschool snacks served to students approved for free meals at the site during the claiming month. **This is for CEP and Non-CEP schools. Notice that Total CEP Meals in column M is "0" for all schools.**

12. **Reduced Price Student Meals** - Enter the number of afterschool snacks served to students approved for reduced price meals at the site during the claiming month.

13. **Paid Student Meals** - Enter the number of afterschool snacks served to paid students at the site during the claiming month.

    Notice that for Snack Claims, the Total CEP Meals is at "0" for all schools.

14. **Delete the top row of headings**. To do this, a) highlight the entire first row, b) click on "Home" on the top menu, c) click on "Delete".

    Please note that after deleting the headings, the data for the first school moves up to the first row.

15. "Save" the electronic excel file with deleted headings to your computer and label it with the claim type and month of claim. We strongly recommend you create and name a folder just for all your saved monthly claims.

16. Return to the claim screen (you should still be logged in.).
    Click on **BROWSE** and choose the file that you just saved to your computer.

17. Click **UPLOAD** to upload the excel file into the online claiming portal.

18. This page will auto populate based on your excel sheet. Review your numbers. Make sure all of your non-area eligible sites are listed on the claim and no error messages, then click **NEXT.** If there are error message refer to the section on Troubleshooting.

19. This screen shows the total afterschool snacks that you are claiming by category for each site.

20. This page will auto-populate. Check the claim information, enter your CERTIFICATION information (your contact information), and click **SUBMIT** to submit the claim.

View-Print an Afterschool Snack Program Claim

1. Select *View-Print Claim* to view and/or print a claim. A claim may be viewed and/or printed after it has been submitted to DPI. The claim does not have to be processed to be viewed.

2. Select date claim month and year from the drop-down list box and click "**SEARCH**" button. If a claim is found for the given criteria, it will appear in the box below the *Claim Type*. Click the hyperlink to view the full claim information.

3. A list of all of the individual school site's claiming information will appear at the bottom of the claim, so you can do a final check of the submitted information. Because this claim is "New (Unpaid)" which means it has not been processed for payment, it may be modified by the SFA.

Modifying an Afterschool Snack Unprocessed Claim

1. Open the saved excel file on your computer that you want to modify and make the changes needed. "Save" the excel file again to your Monthly Claim folder.

2. In Online Services, select *Modify Claim* from the menu to modify an **unpaid and unprocessed** Afterschool Snack claim for reimbursement.

> If your claim is in "Paid" status, the claim CANNOT be modified online. You must submit an "Adjustment" via fax or email a scan of the changes to the attention of Jacqueline Jordee, fax 608-267-9207; email Jacqueline.jordee@dpi.wi.gov. See "Submitting a Claim Adjustment".

3. The unpaid submitted claim will appear. If you wish to modify the claim, check the box in the lower left-hand corner. If you check this box and click **NEXT**, the previously submitted claim will be removed from the system, and it will take you back to the claim site upload.

4. Upload the excel spreadsheet from your computer with the corrected numbers.

Entering an Area Eligible Afterschool Snack Program Claim

1. Once you have logged into Online Services, select *School Nutrition Program* from the menu bar. Then select *Monthly Reimbursement Claim*.

2. Select **Afterschool Snacks Area Eligible** - *If your SFA has schools that are in Afterschool Snacks and Afterschool Snacks Area Eligible, you will need to enter two claims, one for Afterschool Snacks and one for Area Eligible Afterschool Snacks.*

3. Select *Enter-Modify Claim* to enter a new claim for reimbursement.

4. Select the month for which you are **claiming** and the **correct year** from the drop-down box. Then click on "**Template File**."

5. An excel spreadsheet will appear with all Afterschool Snack Area Eligible sites in your agency listed by school code. (School codes are found on Schedule A of SFA's online contract.) Student Approved Free, Student Approved Reduced, Enrollment, Reduced Student Meals, Paid Student Meals, and Total CEP Meals are "0", as we do not collect this information for Afterschool Snack Area Eligible claims because all meals served are free at area eligible sites.

6. **Days Operating** - Enter number of days the site served snacks during claiming month.

7. **ADA** (**average daily attendance**) - Enter the average daily attendance (ADA) for afterschool snack area eligible for the claiming month at the school. These boxes are for the number of students **attending** the *afterschool snack schools, **not** the number of students eating snacks.*

8. **Free Student Meals** - Enter the number of afterschool snacks area eligible served to students approved for free meals at the site during the claiming month. (This will be all of the snacks served at this site as all snacks served at area eligible sites are free.) **This is for CEP and Non-CEP schools.**

   Notice that for Snack Claims, the Total CEP Meals is at "0" for all schools.

9. **Delete the top row of headings**. To do this, a) highlight the entire first row, b) click on "Home" on the top menu, c) click on "Delete".

10. "Save" the electronic excel file with deleted headings to your computer and label it with the claim type and month of claim. We strongly recommend you create and name a folder just for all your saved monthly claims.

11. Click on **BROWSE** and choose the file that you just saved to your computer and click **UPLOAD** to upload the excel file into the on-line claiming portal.

12. Make sure all of your afterschool snack area eligible sites are listed on the claim and no error messages, then click **NEXT.**

13. This screen shows the total afterschool snacks area eligible that you are claiming for each site.

14. This page will auto-populate. Check claim information, enter CERTIFICATION information, and click **SUBMIT** to submit the claim.

View-Print an Area Eligible Afterschool Snack Program Claim

1. Select *View-Print* to view and/or print a claim. A claim may be viewed and/or printed after it has been submitted to DPI. The claim does not have to be processed to be viewed.

2. Select date claim month and year from the drop-down list box and click "**SEARCH**" button. If a claim is found for the given criteria, it will appear in the box below the *Claim Type.* Click the hyperlink to view the full claim information.

3. A list of all of the individual school site's claiming information will appear at the bottom of the claim, so you can do a final check of the submitted information. Because this claim is "New (Unpaid)" which means it has not been processed for payment, it may be modified by the SFA.

Modifying an Afterschool Snack Area Eligible Unprocessed Claim

1. Open the saved excel file on your computer that you want to modify and make the changes needed. "Save" the excel file again to your Monthly Claim folder.

2. In Online Services, select *Modify Claim* from the menu to modify an **unpaid and unprocessed** Afterschool Snack claim for reimbursement.

> If your claim is in "Paid" status, the claim CANNOT be modified online. You must submit an "Amendment" via fax or email a scan of the changes to the attention of Jacqueline Jordee, fax 608-267-9207; email Jacqueline.jordee@dpi.wi.gov.

3. The unpaid submitted claim will appear. If you wish to modify the claim, check the box in the lower left-hand corner. If you check this box and click **NEXT**, the previously submitted claim will be removed from the system, and it will take you back to the claim site upload.

4. Upload a new excel spreadsheet with the corrected numbers.

APPENDIX A

REPORTING PRE-KINDERGARTENERS AND KINDERGARTENERS

The following explains how to report kindergartners and pre-kindergartners on the edit check and the monthly reimbursement claim. As a general rule, if kindergartners or pre-kindergartners have access to the National School Lunch Program on a particular day, then for that day they are to be included in both the Enrollment and the Average Daily Attendance (ADA) figures. Below, we have identified three different kindergarten situations. Please read through these explanations and decide which situation applies to your school.

1. Kindergartners/pre-kindergartners who go either full days or half days daily, and who do eat lunch, **are to be included** in the Enrollment as well as the ADA figures.

2. Half-day kindergartners/pre-kindergartners, who do not eat lunch at school, **should not be included** in the Enrollment or the ADA figures.

   1. Kindergartners/pre-kindergartners, who go full days but only several days a week, **should be included** in both the Enrollment and the ADA figures, **but only on those days when they are in school.**

To determine the **Enrollment** for the month, you would divide the total enrollment by the number of days served. In this case, 2900 would be divided by 10 days, for a monthly enrollment of 290.

To determine the **Average Daily Attendance (ADA)** for the month, you would divide the total daily attendance for the month by the number of days served. In this case, 2768 would be divided by 10 days, for an ADA of 277.

If you have any questions concerning the reporting of pre-kindergartners/kindergartners in your school, please contact **School Nutrition Programs** at (608) 267-9228.

Appendix B

Required Edit Check for National School Lunch Program

U.S. Department of Agriculture (USDA) regulations require school agencies to complete an edit check for each of its schools that participate in the National School Lunch Program prior to consolidation of the daily lunch counts for the monthly reimbursement claim. The purpose of the edit check is to identify errors in the schools' lunch counts and/or problems with the meal counting and claiming procedures so that necessary corrections are made. The prototype daily participation/edit check form is provided by DPI. However, school agencies are not required to use this particular form but must perform an edit check after completing the calculations shown on the bottom of the form. Those school agencies with computerized meal counting systems or in process of purchasing such a system should ask vendors about the edit check feature.

USDA's Required Edit Check Procedures for Each School

1. *Obtain and record the highest number of students in each category.*
   - Obtain the highest number of students <u>approved</u> for free and for reduced price lunches.
   - Obtain the highest student enrollment in the schools submitting lunch participation data for the month. Exclude those students who do not have access to the lunch program (e.g., half-day kindergarten and/or pre-kindergarten students) when arriving at the enrollment figure to use in the edit check.
   - **Subtract the number of students approved for free and reduced price meal benefits from the student enrollment to obtain the number of students for the paid category.**

2. *Compute the attendance factor.*
   - Divide the average daily attendance for students by the school enrollment to obtain the attendance factor. The attendance factor is percentage of students in attendance and is not the percentage of students participating in the school lunch program.

   Note: The attendance factor must be calculated at least once each school year but may be computed each month.

3. *Calculate the "highest number of lunches expected for any day" by eligibility category.*
   - Multiply the highest number of students in each category by the attendance factor.

4. *Compare the "highest number of lunches expected for any day" to the daily counts recorded on the participation record for each of the eligibility categories.*

5. *Evaluate any daily lunch counts that exceed the "highest number of lunches expected".*
   - The school may find that students approved for the free or reduced price lunches attend at a higher daily rate than those students in the paid category.
   - Documentation such as daily attendance records or check-off rosters may be used to support daily counts that exceed the "highest number of lunches expected".
   - Scan the daily counts and evaluate any that appear unusual, such as transposed digits, counts reported in the wrong category or questionable patterns in daily counts.

6. *Correct any lunch count reporting errors that are discovered during the edit check before consolidating counts for the reimbursement claim.*

Although it is not required to complete an edit check incorporating an attendance factor, USDA regulations prohibit claiming for free and reduced price breakfasts in excess of the number of children approved for free and reduced price breakfasts.

How to Submit a Claim Adjustment when the Claim is Already in Paid Status

Once a claim is paid, SFAs can no longer modify a claim in Online Services. When SFAs need to submit an adjustment, an excel file showing only the adjustments from the paid claim should be emailed to Jacqueline.jordee@dpi.wi.gov.

First, open the excel claim file that needs the adjustment. Enter only the differences from the claim that was paid. You will need to use a "-" sign when entering a negative number. If there are no changes in a cell, enter a "0".

For example, an SFA was paid for this claim, and later realized there were errors:

For the adjustment, the SFA emailed this excel sheet to DPI Accounting, showing they had overclaimed 18 free meals, and underclaimed 70 reduced price meals and 6 paid meals:

If the adjustment results in additional funds to be paid to the SFA, you will receive an ACH deposit. Details can be found on the Aids Register. If the adjustment results in an overpayment to the SFA, the amount owed back to DPI will be deducted from the next reimbursement claim payment.

Frequently Asked Questions

1. **Claims Due – When?**
   Claims are due within SIXTY CALENDAR DAYS of the last day of the claiming month.
   (Example: The September 2017 claim is due November 29, 2017)

2. **Is There Any Time When I Cannot Enter a Claim?**
   Yes. 1) When the Payment Process Package for claims is running, you cannot access the "Enter Claims" part of Online Services. This process usually lasts only a short time and is typically done on Tuesday mornings with few exceptions. If this process is running, you will get an error message telling you to wait one hour, and then retry. 2) If you've already submitted a claim for a program that needs to be processed, another claim cannot be submitted. Online Services only allows one unprocessed claim per each program in the system. Other than these exceptions, the "Enter Claims" area of the Online System is available anytime from anywhere. As long as our server is online (which it always should be), we will accept any claim data or requests for past claims information.

3. **Claim Data and Errors**
   There are "edit-checks" on certain fields on the claim forms. These edit-checks will not allow certain data to be entered. If you think you have entered valid data and the Internet site will not accept it, please call Jacqueline Jordee at 608-267-9134. If necessary, a paper claim may need to be submitted.

4. **Why or When Would I Modify a Claim?**
   If a previous claim's data is incorrect, and it has NOT been paid, you can submit the data again with the correct data. Once the claim is paid, it CANNOT be modified online. You will need to submit a paper claim as an adjustment/amendment by fax at 608-267-9207 or email to Jacqueline.jordee@dpi.wi.gov.

5. **I can't Get into Online Program to Enter Information**
   The Online System checks the agency code against our valid contract file. If you do not have a valid contract on file for the specific program you are trying to enter, you will not be able to access the screens. If you think you have a valid contract and still cannot get into the entry screen you desire, please call the School Nutrition Team at 608-267-9228.

Contacts

Contact names and phone numbers on this page are for questions relating <u>directly</u> to the entering of claims or data in Online Services. Please direct your questions to the Primary Contact first, then to the Secondary Contact (only if the Primary Contact cannot be reached).

PLEASE HAVE THE ANSWERS TO THE FOLLOWING 4 QUESTIONS AVAILABLE FOR THE CONTACT PERSON:

1. What is your agency code/agreement number?
2. What program are you entering a claim for? (Example: "NSLP")
3. What screen are you looking at? (Example: "1st entry screen", "Printing screen", etc.)
4. What page in this manual are you looking at?

Primary Contact	**Secondary Contact**
608-267-9134	608-267-9228
Jacqueline Jordee, Accountant	School Nutrition Team Reception
Jacqueline.jordee@dpi.wi.gov	dpifns@dpi.wi.gov

Troubleshooting Submitting Monthly Child Nutrition Claims

Spinning wheel
Do not use the browser Firefox (Mozilla). Use Internet Explorer or Chrome to submit claims.

Cannot edit template excel file
After opening the template, be sure to click on "Enable Editing". Then save the template to your computer.

The date or the program name is wrong on the template excel file
You should not change any of the information that populates on columns A through D on the template. Columns A through D will auto-populate from the information on your Online Contract and from the Date you selected from the dropdown. If these columns are wrong, then either your online contract needs to be updated or the correct date must be selected from the dropdown before you will be able to submit the claim.

School code number is incorrect or missing on the template file
School codes in column B of the template come from Schedule A of your approved Online Contract. If the school codes are incorrect or school codes are missing, be sure the date you selected on the claim dropdown is correct <u>before</u> clicking on "Template". If the school codes are not correct, please review Schedule A of your Online Contract for errors.

Be sure you deleted the header on the template, and saved the file to your computer before you upload.

Common error messages
- "Invalid data value" for every column on row 1 – User failed to delete header.
- "Claim for month/year is not due for reimbursement." – User failed to select the correct date month and year from the dropdown.
- "File has invalid Date Claim" – User changed the date in the template.
- "Average Daily Attendance must be less than OR equal to Enrollment – User entered a percentage or decimal for the ADA. The ADA must be a whole number, rounded up to next whole number.
- "Free/Reduced Student Meals are too high. Please contact DPI Federal Fiscal Unit" – The contact for Federal Fiscal Unit is jacqueline.jordee@dpi.wi.gov.
- "Data upload failed due to incorrect number of columns." – User should not delete any columns even if they are "0".
- Red X under approved sites – User failed to select the correct dropdown before clicking on Template and incorrect school codes auto-loaded into excel sheet, or online contract needs to be updated.
- "Reduced Student Meals value is too high" – Contact Jacqueline.jordee@dpi.wi.gov or 608-267-9134.
- "Total Student Meals should be more than zero" –If a site does not serve meals for the claiming month and columns J through M are "0", delete the row for that site. (For example, some schools may not serve snack for the month of August, so when submitting the August Snack claim, that site's row should be deleted.)

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

(1)   mail: U.S. Department of Agriculture
        Office of the Assistant Secretary for Civil Rights
        1400 Independence Avenue,
        SW Washington, D.C. 20250-
        9410;

(2)   fax: (202) 690-7442; or

(3)   email: program.intake@usda.gov.

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